Advanced Information Manager
User Manual

Virginia Department for the Aging
January 2006

Table of Contents

AIM: ADVANCED INFORMATION MANAGER
Policies, Responsibilities and Procedures

Introduction:

Advanced Information Manager (AIM) is a client database and tracking system that allows the Area Agency on Aging to track clients, the services they receive, and their changing needs over time. In Virginia, AIM is used to track and report client and service data to the Virginia Department for the Aging. AIM complies with national reporting requirement for aging agencies (NAPIS). The types of data that can be entered and retrieved in AIM include demographics and individual client data, service activities, assessment information, and customized agency information. All data in AIM is attached to an individual client. Information can be retrieved for individual clients, or in categories (groups) set up by the AIM administrator. AIM uses the Windows environment, bar code technology, and customizable assessment items and services to provide an easy-to-use, versatile tool for collecting and reporting client information and services.

AIM makes it easier to accurately report the services the agency is providing to area seniors, as well as evaluate the types of seniors being served. To ensure continuity and accuracy, AIM procedures should be the same for all locations in the agency. Please follow the procedures outlined for data collection and data entry carefully. This will keep the information entered into AIM uniform, so reports and data analysis will accurately reflect client demographics and service units.

I.   General Policies

A. Setting AIM Policies and Procedures

The AIM Administrator is responsible for setting procedures for AIM data collection and data entry according to Area Agency on Aging and VDA policies. All requests or suggestions for changes or additions to AIM procedures, data collection, and data entry must be submitted to the AIM Administrator for review and approval. This will help to assure uniformity and policy compliance for data in AIM.

B. AIM Staffing Requirements

The AIM Administrator and Director will regulate staff approved and trained to use AIM. All staff who use AIM will participate in orientation and training as specified by the AIM Administrator, including data entry and program procedures. New or current staff who want to use AIM must have orientation and training before beginning data entry or taking on additional AIM tasks.

II.   Responsibilities

The areas of responsibility for data collection, data entry, and printing monthly reports from AIM for each program area are set by the AIM Administrator and Program Directors. Data collection is usually done by staff who has contact with the clients; case managers, care coordinators, intake, program staff, or contractors. Data collection forms are usually passed on to data entry staff, who then input the information into AIM. The AIM Administrator and Program Directors will establish office procedures for routing client forms and service unit rosters between appropriate personnel. A backup staff position may be assigned to assist the primary person(s) when needed. Regardless of who actually performs the data collection, data entry, or prints monthly reports, it is the responsibility of the primary person(s) in each area to make sure data processing is completed monthly in a timely manner, within the established agency and state deadlines.

A. Data Collection
  1. Client Information Forms:

     See Appendix 1 – VDA Services Link to NAPIS Group - for the minimum VDA Uniform Assessment Instrument (UAI) form requirements. Check with your AIM Administrator for your agency's standards, as they might be more stringent.
     a) VDA Services Link to NAPIS Group (Appendix 1)
     b) UAI - Full Assessment (pages 1-12)
     c) UAI Part A (pages 1-4)
     d) UAI Short Assessment (pages 1-3)
     e) Nutritional Health Screening (Appendix 2)
     f) VDA EZ Quick Form (Appendix 3)
     g) VDA Caregiver Form (Appendix 4)
     h) VDA Required Fields:
        1) SSN, DOB, Race (Ethnicity), Sex, Income (Federal Poverty), Living Situation
  2. Service Units (Activities):

     Various types of forms are used to collect monthly information on services rendered to agency clients. Program staff or subcontractors generally fill out rosters, data collection forms, monthly reports, or submit bills indicating specific services each client receives. Service units can only be entered into AIM for an individual client, and must be collected that way. AIM does not track aggregate data, or data not attached to an individual client. Check with your AIM Administrator for forms used in your agency.
     a) Activity Rosters (SC01-SC03) (Appendixes 9 & 10)
     b) Monthly reports from case managers or contractors
     c) Service bills from vendors or contractors

B. Data Entry in AIM
  1. Data Entry Staff: AIM data entry can either be centralized or decentralized, depending on the individual agency's policies and staff availability.
  2. Data Entry Frequency
     a) UAI, Nutritional Health Screening and other Client Assessment/Information forms: Data entry completed for each UAI, etc. on an ongoing basis during each month.
     b) Service Units: Data entry should be completed each month for services received in the month. Service units can be entered on a daily basis, or entered using weekly or monthly totals. VDA requires a minimum of monthly totals for entered for service units.

C. Monthly Reports
  1. The AIM Administrator and other staff prints reports as needed for local use. AIM Administrator prints reports for VDA on a monthly basis.

III. Using AIM

A. Common Features of AIM
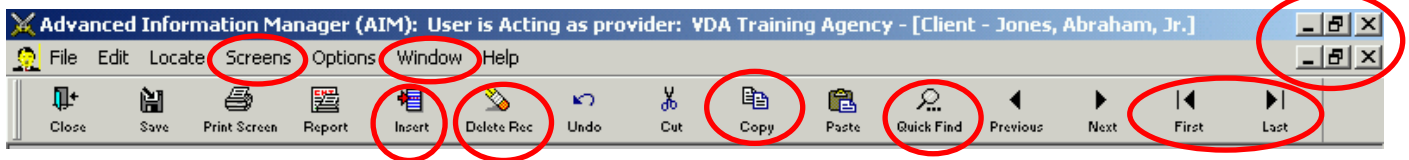
B. Main Client Screen (Demographic Data)

Go to the Client Main Screen:
Screens > Client > Client Info

1. Client Quick Find List

   a) Search by Name (default mode)

      1) Client list is displayed in alphabetical order

      2) Type the Client's Last Name in the FIND box in the Client Quick Find list

      3) Type a comma and then the Client's First Name

      4) You may scroll through the list by using the scroll bars on the right side of the Quick Find list until you find the correct client

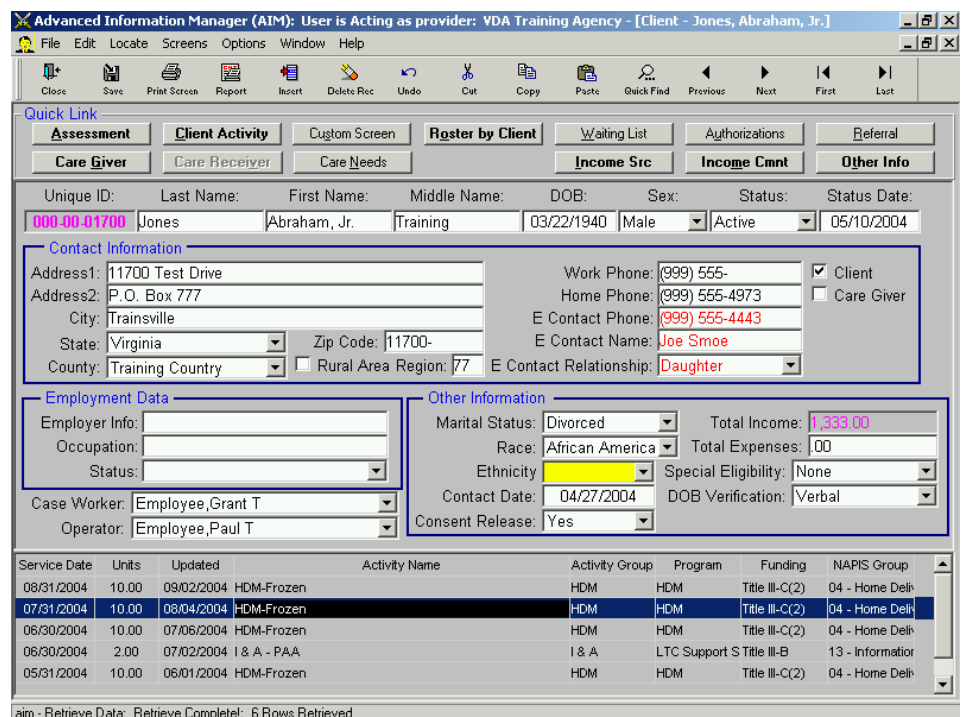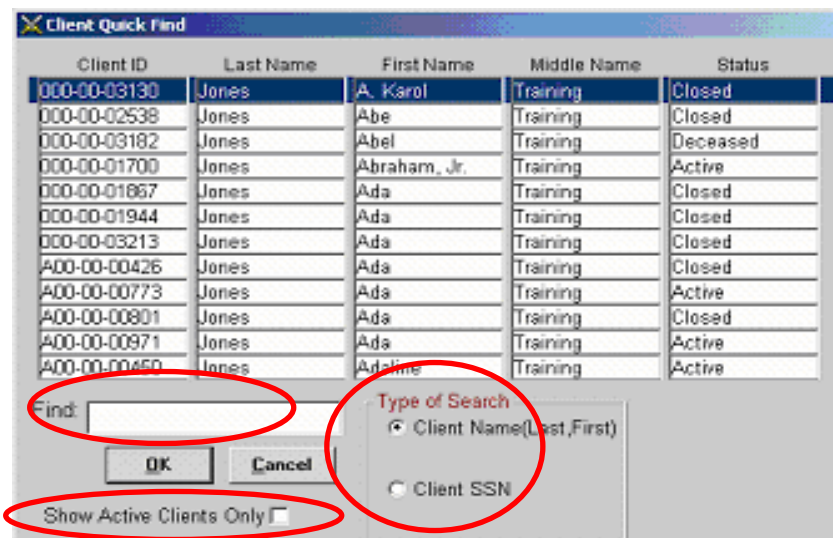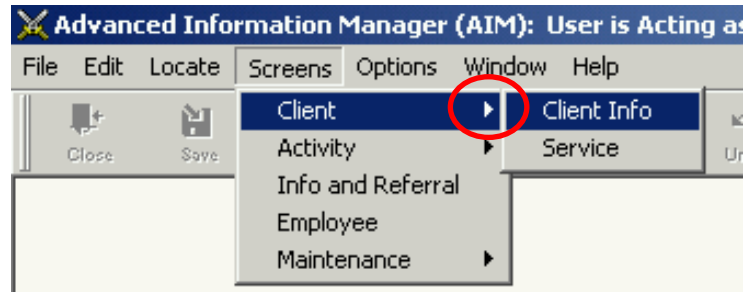   5) Hit Enter or click OK

   b) Search by SSN

      1) Single Click on Client SSN in Type of Search Box

      2) Client list is displayed in numerical order by SSN

      3) Type the SSN in the FIND box in the Client Quick Find list (no hyphens)

      4) Hit Enter or click OK

   c) Show Active Clients Only

      1) If client name or SSN is not displayed, uncheck this box to display all clients

2. Client Main Screen
   a) Main LINK buttons
      1) Button Text is BOLD when the item has content (Bold display not updated for new content until screen display is refreshed)
      2) Quick Link Buttons: Assessment, Client Activity, Custom
      3) Comments Buttons: Income Screen, Income Comment, Other Info
   b) Client and/or Caregiver
      1) Check boxes: Not checked when new record inserted
      2) Buttons: Care Receiver, Care Giver
      3) Quick View Client Services:
      4) Client Service Units displayed across entire lower portion of screen
      5) Listed in date order
      6) Column width
   c) Navigating in the Client Main Screen
      1) Navigating between client records
         Do not close the Main Client screen to view another existing client!
         (i) Client Quick Find:
            (a) With a current client displayed, click on the Quick Find button on the Toolbar
            (b) Scroll through the Quick Find Client List and select the desired client
            (c) The client's record is displayed in the current window
         (ii) Navigation Buttons:
            (a) On the Client Screen, single click on the Navigation Buttons on the Toolbar
            (b) Previous, Next, First, Last
            (c) The client's record is displayed in the current window
      2) Navigating within the client record
         (i) Tab (or Enter) and Shift+Tab
         (ii) Tab Order (watch for variations)
         (iii)Scroll bar for service units
   d) Data Field characteristics
      (i) General characteristics
         (a) Status Bar displays messages for some data entry fields
         (b) Fields that can be edited (white background)
         (c) Display only fields (gray background)
         (d) Replace all text in field
            (1) Highlighted text in Text Fields is replaced by next keystroke
            (2) Hitting Tab or Enter at the end of data entry for a field will take you to the next field with existing data highlighted for replacement
         (e) Edit existing text in field
            (1) Click in the field with the mouse to EDIT existing data without replacing it
         (f) Display characters for certain fields
            (1) DO NOT TYPE DISPLAY CHARACTERS FOR THESE FIELDS!
            (2) SSN – Hyphens already present in SSN display
            (3) Date fields – Slashes between day, month, and year already present

(4) Area Code and Phone Numbers – Parenthesis and hyphens already present

(5) Zip Code + extension – Hyphen between zip code and extension already present

(ii) Specific types of data fields

    (a) Check Box (Client, Caregiver, Rural)

    (b) Text Fields (SSN, Name, address, etc)

        (1) Accepts Alpha-numeric characters

    (c) Numeric data only (phone, zip code, region)

    (d) Date

    (e) List only

    (f) List or Text

3. Search the QUICK FIND Client List for existing clients

    a) Be extremely thorough when you check the client QUICK FIND for the client's name and SSN BEFORE you enter a new client record. In some cases, this requires a little investigation by comparing client records to ensure that clients are not entered into AIM more than once. Duplicate client records make service unit data entry problematic and report statistics inaccurate.

    b) Common items to check or compare include:

        1) Client's real SSN vs. a generated/created SSN

        2) Name variations

            (i) Common last name spelling variations: Stuart and Stewart, Gonzalez and Gonzales

            (ii) First name vs. nicknames: William or Bill, Elizabeth or Beth or Liz

            (iii) Last names that include a suffix, such as Sr. or Jr. are alphabetized as a completely different last name. This results in client with the last name of "Smith, Sr." being alphabetized AFTER all the clients with the last name of "Smith". You won't catch this UNLESS you scroll through all the names on the Smith list!

            (iv) Scroll the Quick Find list to check for spelling variations on each name before you assume that the client has not yet been entered into AIM.

            (v) Client's full legal name is the preferred name to use in AIM

            (vi) Recommended name format for data entry:

Last Name	Legal Last Name[comma][space][Suffix]	Jones, Sr. Smith, III
First Name	Legal First Name[space][(Nickname)] * Uses both First and Middle name as first * Legal signature is First Initial & Middle Name	Elizabeth (Betty) Mary Jane R. Joseph
Middle Name	Middle Name (or Middle Initial)	Anna

        3) Race

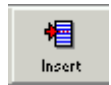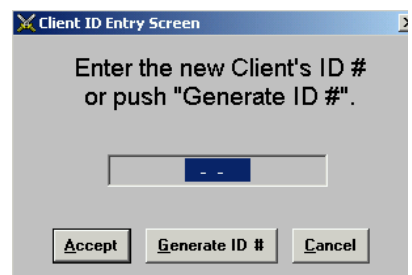   4) Birth date

        5) Address

IV. UAI Demographic Data

Entering Client Information on the Main Client Screen

A. Social Security Numbers

1. ALL DATA ENTRY MUST USE THE CLIENT'S AIM ID NUMBER AS THE UNIQUE IDENTIFIER FOR THAT CLIENT. This allows information to be entered for the correct client. The potential exists to have many clients with the same names in AIM.

2. Staff should request the actual SSN from clients when filling out the UAI form. Reassure clients that their SSN will not be given out on any list to outside agencies, or used in any way to identify them to other program (such as Medicare). The SSN is the unique number that VDA has chosen to distinguish between different people with the same name.

3. ASSIGNING ID NUMBERS FOR NEW CLIENTS WITH UNKNOWN NUMBERS: When a client refuses to give his or her actual SSN, a unique ID number is assigned to them. ID numbers can be entered in AIM using the following methods. The AIM Administrator and Director will indicated which method the agency uses.

   a) Allow AIM to generate a unique, 10 digit number to serve as a SSN for this client.

   b) (Optional: Enter a pre-existing unique 9 or 10 digit number determined by the AIM Administrator, such as a driver's license number or client number from another system. The assigned SSN is typed into the system just as a regular SSN is entered.)

   c) (Optional: Create a unique 9 digit SSN according to a predetermined formula determined by the AIM Administrator. The proposed number must be checked in AIM before being assigned to the client. The assigned SSN is typed into AIM just as a regular SSN is entered.)

   d) Please <u>write the Generated/Created number in the SSN space on the UAI form</u>, and indicate '**GENERATED**' or '**CREATED**' next to the number on the paperwork.

4. **Please be careful in entering the SSN! Typing extra characters or spaces will cause problems for future data entry and report statistics inaccurate**

B. Insert a new client in AIM

1. Check the QUICK FIND Client List for Client before you create a NEW CLIENT!

   a) Be extremely thorough when you check the client QUICK FIND for the client's NAME and SSN <u>BEFORE</u> you enter a new client record.

   b) When you don't check completely, duplicate records can be created, adding problems for the staff doing service unit data entry.

   c) If you find the client already in AIM, do not enter as a new client!

      1) Update the client's Main Screen

      2) Insert the assessment for the client

2. With a current client displayed on the Client Main Screen, Single Click the Insert Button on the toolbar

   a) Enter the client's SSN in the CLIENT ID ENTRY SCREEN and click ACCEPT

      1) This generates a blank Client Main Screen, with the SSN filled in

      2) Yellow Highlighted Text Boxes indicate fields required by the local agency

   b) Client and/or Caregiver Check Boxes

      1) Neither box is checked when you insert a new client

      2) ALWAYS CHECK the client box when inserting a new client/participant

      3) ONLY CHECK the caregiver box for actual Title IIIE caregivers

      4) VOLUNTEERS should have CLIENT box check ONLY when they are also a client/participant

c) Fill in the client data from page one of the UAI
    1) VDA Required Fields:
        (i) Name, SSN, DOB, Race (Ethnicity), Sex
        (ii) COUNTY or CITY CODE (JURISDICTION LOCATION)
            (a) Virginia code listing provided by VDA (Appendix 5)
            (b) USE THE CLIENT'S ACTUAL ADDRESS TO DETERMINE JURISDICTION LOCATION, not the postal delivery area, zip code, or the program location where client receives services.
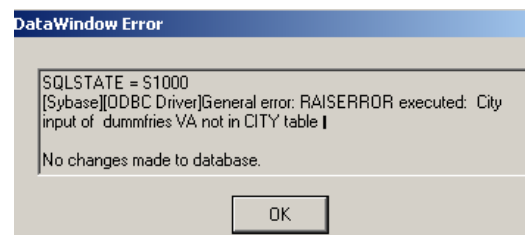

    2) Virginia City List
    3) Mark the data collection form after data input in AIM:
        (i) AIM
        (ii) Date of data entry
        (iii) Data entry operator's initials

C. Linking Care Giver / Care Receiver

VDA requires clients receiving Title IIIE services to have a corresponding Caregiver (Care Giver) entered into AIM and linked to the client (Care Receiver)

1. Enter both client and caregiver in AIM
2. Check the appropriate Client and Caregiver Box for each
3. Link Care Giver to Care Receiver

    a) With the Caregiver record displayed, Single Click on the Care Receiver button

        1) The Select Clients cared for by (caregiver name) Window is displayed
        2) Scroll through the list of Care Receivers
        3) Highlight clients(s) being cared for by this Caregiver
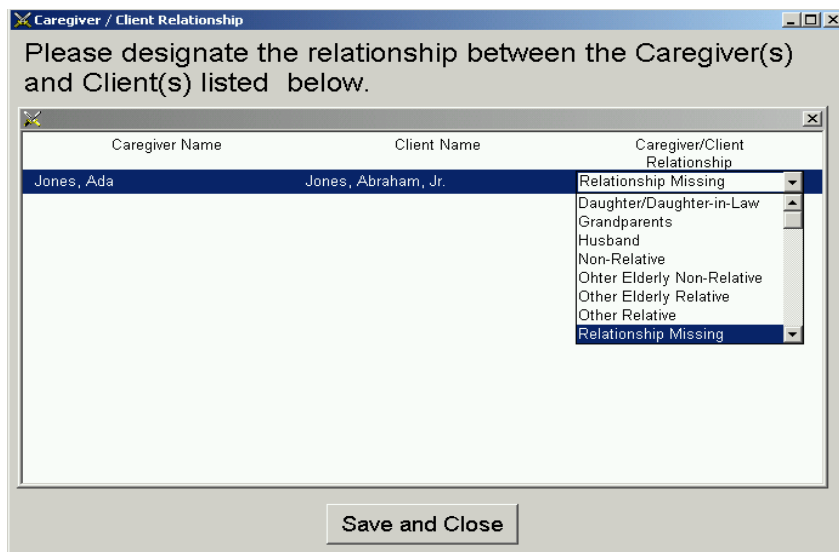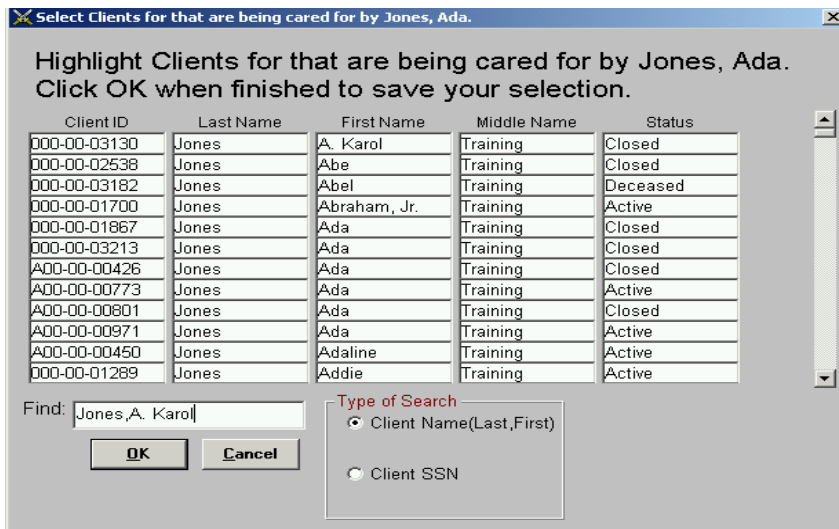   4) Click Okay when selection complete

    b) Caregiver / Client Relationship window is displayed

        1) Confirm that the Caregiver and Client(s) displayed are correct
        2) Select the correct relationship for the Caregiver and each Client from the drop-down list
        3) Click Save and Close to save the changes

4. Confirm that the link is established in the Care Receiver record
   a) With the Care Receiver record displayed, Single Click on the Care Giver button
      1) The Select people caring for (client name) Window is displayed
      2) Scroll through the list of Care Givers
      3) Confirm that the appropriate caregiver(s) for this client are highlighted
      4) Click Okay when selection complete
   b) Caregiver / Client Relationship window is displayed
      1) Confirm that the Caregiver and Client(s) and relationship(s) displayed are correct
      2) Click Save and Close to save the changes
5. Unlink Care Giver and Care Receiver
   a) Repeat the linking steps above, unselecting the appropriate care receiver(s) / care giver(s) on the lists
   b) Click the highlighted care receiver or care giver on the list to remove the link
   c) Click Okay to save the changes

V.   UAI Assessments

A. Client Assessment Responsibilities

CLIENT ASSIGNED TO A PRIMARY PROGRAM FOR ASSESSMENTS AND REASSESSMENTS

1. Single Program Clients: Most clients are served in one program area at a time, which becomes the Primary Program for that client. The Primary Program staff is responsible for assessing and reassessing the client.
2. Multiple Program Clients: Where multiple program areas, including Case Management, serve the same client, Case Management will be the PRIMARY PROGRAM for that client.
   a) Only the Primary Program staff will do assessments/reassessments for a shared client.
   b) Staff in other programs should coordinate with the Primary Program staff on reassessment needs.
3. Change Program Area: When a client changes from one program area to another, a REASSESSMENT IS NOT NECESSARY, as long as the current assessment is within the appropriate 6 month or once a year schedule for the new program, AND the client's capabilities have not changed.

B. WHEN TO DO A REASSESSMENT:

Check AIM before doing an assessment or reassessment to determine if one is necessary! This will avoid duplication of effort and 'bad' data.

1. DO A REASSESSMENT WHEN:
   a) Client's current assessment is older than 6 months (Adult Day/Health Care, Case Management, Personal Care) or one year (all other programs), or as indicated by the AIM Administrator.
   b) The client has experienced MAJOR CHANGES in their capabilities SINCE the last assessment.
2. DON'T DO A REASSESSMENT WHEN:
   a) Client has changed programs, but the current assessment is accurate and assessment date is less than six months or one year (depending on program).
   b) The client address, emergency contact or other demographic information on the main client screen changes, but the current assessment is still accurate.
      1) Update the main screen demographic information when necessary.
   c) A UAI paper copy is needed at the new program site, but the current assessment is still accurate.
      1) Print the current UAI (AIM Reports, Retrieving the UAI).
      2) Confirm with the client that the printed data is still accurate.
      3) Add printed UAI to the client's file rather than doing a new assessment.

d) Program information needs to be added to the assessment, but the current assessment is accurate.
   1) Add the new program specific information to the current assessment.
   2) Actual UAI assessment answers should not be changed or added in current assessments.

C. Assessment Screen
   1. On the Main Client Screen, with the desired client displayed, click on the Assessment Button. Button Text will be in BOLD if there is an assessment for this client. The Assessment Screen will open in a separate window.

   2. General Client Information (Top Section)
      a) ASSESSMENT DATE: When you insert an assessment for a client, the computer will ask you for the assessment date. This is the Assessment Date in the upper right corner of the UAI.
      b) NEXT ASSESSMENT DATE: The computer automatically calculates the Next Assessment Date when the assessment is entered. The AIM administrator can set the time period for calculating the next reassessment, usually one year. ***Most programs and services only require a one-year reassessment!*** If an assessment is required on another date, tab over to the field and type in the new reassessment date.
      c) SCREEN DATE: The Screen Date is a Virginia-specific field, and is not automatically calculated. The Screen Date on the UAI can be the same or different from the Assessment Date. If you have no Screen Date entered on the UAI, use the date listed as the Assessment Date in this field.
      d) VDA Required Fields:
         1) Family Income (Monthly Income)
         2) Number in Family
         3) Congregate Volunteer

3. Assessment Question and Answer Listing (Center Section)
- a) Assessment Question Display Format
  - **1) HIGHLIGHTED LINE INDICATES ANSWER SELECTED**
  - **2) Column listing: Category / Question / Answer (left to right)**
  - 3) Nutritional Health Screening *(Category)*
    - (i) Eats alone most of the time *(Question)*
      - (a) No *(Answer)*
      - (b) Yes *(Answer)*
- b) VDA Required Questions
  - 1) Federal Poverty
  - 2) Lives Alone
- c) AGENCY SPECIFIC CATEGORIES: Enter agency specific Assessment Answers for assessment information, as directed by the AIM Administrator.
4. Buttons (Bottom Section)
- a) Text Boxes: General, Medical, Medications
- b) View: View Graph, Category Scores, View Criteria

D. Navigating in the Client Assessment Screen

Do not close the assessment window to view different assessments for existing clients!

1. General Client Information (Top Section)
- a) Tab (or Enter) and Shift+Tab (highlighted field shows location)
- b) Tab Order (watch for variations)
2. Assessment Question and Answer Listing (Center Section)
- a) Navigate in the Answer Listing Section
  - 1) To move the focus to the Answer Listing
    - (i) From Congregate Volunteer Field, Tab once OR
    - (ii) Single Click on the SCROLL BAR
  - 2) Scroll bar or mouse wheel ONLY for navigating answer listing
  - **3) ANY MOUSE CLICK INSIDE THE ANSWER DISPLAY CHANGES ANWSERS! Do not try to navigate inside the answer display by clicking inside the window.**
- b) Selecting answers
  - 1) Single Click to SELECT a new answer (add highlight)
  - 2) Single Click previously selected (highlighted) answer to UNSELECT the answer (remove highlight)
  - 3) Single Click to SELECT a DIFFERENT answer for previously answered (highlighted) question
  - 4) Double clicks are not recognized in this section, and are treated as a single click
3. Go to another assessment for the same client:
- a) On the Assessment Screen, single click on the Navigation Buttons on the Toolbar
- b) Previous, Next, First, Last
- c) The selected assessment will be displayed in the current window
4. Go to an assessment for a different preexisting client:
- a) On the Assessment Screen, single click on the Quick Find button on the Toolbar
- b) Scroll through the Quick Find Client List and select the desired client
- c) The selected client's assessment will be displayed in the current window

E. UAI Assessment Data Entry

YOU MUST INSERT AN ASSESSMENT RECORD FOR EVERY ASSESSMENT/REASSESSMENT A CLIENT HAS! THIS IS A VDA REQUIREMENT! Regardless of whether the reassessment is done on the original UAI form or a new form, an assessment must be inserted in AIM each time. ASSESSMENT GENERAL INFORMATION; CATEGORIES, QUESTIONS AND ANSWERS: All information entered here WILL TRANSFER TO SUBSEQUENT REASSESSMENTS.

1. Insert an Assessment

   On the Main Client Screen, with the desired client displayed, click on the Assessment Button

   a) The Client Assessment Screen will open in a separate window

   b) FIRST ASSESSMENT

      1) If there is no pre-existing assessment for this client, a screen prompts you to enter one.

      2) Type the new Assessment Date in the Assessment Date Box

      3) This will generate an assessment screen with no data entered, except the Assessment Dates

         (i) Select only the answers the client has answered on the UAI and other VDA or agency forms

         (ii) Enter General Information in the top portion of the assessment screen

         (iii)Select Assessment Answers in the center section

         (iv)Enter notes in Text Boxes in the bottom section as needed
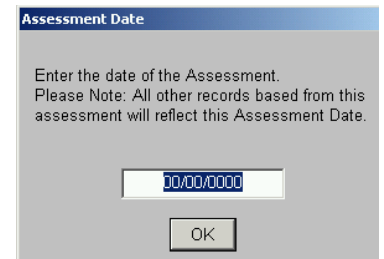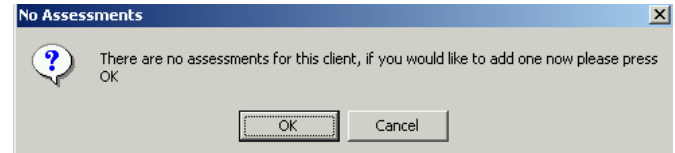
   c) INSERT RE-ASSESSMENTS

      1) Go to the Client Assessment Screen with the desired client's current assessment displayed

      2) If there is at least one assessment for this client, the answers will display on the screen

      3) Single click on the Insert Button on the Toolbar

         (i) Type the new Assessment Date in the Assessment Date Box

         (ii) This will generate a new assessment with the same information as the previous assessment

         (iii)Answers carried over from the previous assessment are highlighted

      4) Update the new assessment

         (i) Update General Information in the top portion of the assessment screen as needed

         (ii) Update Assessment Answers in the center section as needed

            (a) CHANGE answers in AIM that have changed since the last assessment

            (b) ADD new answers not found in the previous assessment

            (c) REMOVE answers from the previous assessment that are not answered on this assessment

         (iii)Modify notes in Text Boxes in the bottom section as needed

   d) **ALL answers must be reviewed for correctness for each assessment, not just those changed!**

   e) Mark the data collection form after data input in AIM:

      1) AIM

      2) Date of data entry

      3) Data entry operator's initials

F. Navigate between Open Windows

Use the Window item on the menu drop down list to move between Client's Main Screen and Assessment Screen (and other open screens), once you have opened an Assessment Screen for the first time of the data entry session.

1. Single left click on the Window item on the Menu. This will open the drop down menu. At the bottom of the menu, Aim will display a list of the open screens. The screen currently displayed will have a checkmark in front of it. The list indicates 'CLIENT' and a name for an open Client Main Screen, 'ASSESSMENT' and name for an open Assessment Screen, etc.

2. Scroll down the drop down menu to the screen you wish to see and single left click on the name. This will bring forward the open screen that you selected, without closing the other open screen(s).

3. To change back to the previous open screen, repeat steps 1 & 2 above. This will bring forward the open screen that you selected, without closing the other open screen(s).
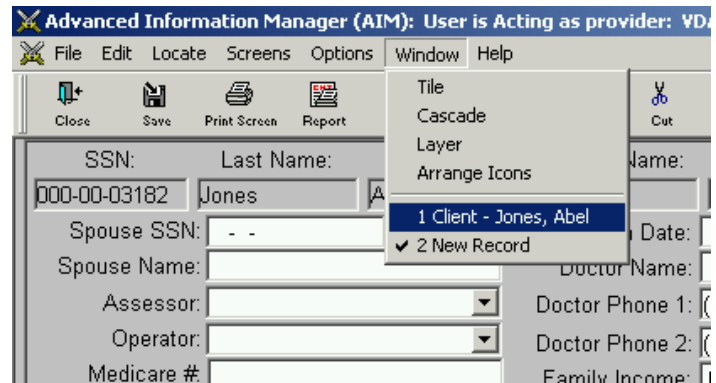
VI. Duplicate Client Records in AIM

When a duplicate entry of a client record is discovered, please report both records, by name and SSN, to the AIM Administrator. Use these criteria to check both records and gather information to assist the AIM Administrator in combining the records.

A. Review duplicate Client Records:

1. DEMOGRAPHIC INFORMATION: Which record has the correct SSN, address and demographic information on the client?

2. ASSESSMENTS: Which record has the most accurate assessments entered? Are there any duplicate assessments between the two records?

3. SERVICE UNITS: Which record has the most accurate service units? Are there any duplicate service unit entries between the two records?

B. Check with the program administrator, the data entry operator(s) who entered both records, and the case worker(s)/staff who filled out the assessment(s):

1. Advise them of the duplication of client records in AIM, including verifying the correct SSN for the client

2. Solicit their input in determining which information is correct

3. Note which client record, assessments, and services received are correct

C. Refer the duplicate records to the AIM Administrator, who will combine them and delete the duplicate data. Include both SSN for reference, and the information gathered on demographic data, duplicate service units or assessments.

D. THE AIM ADMINISTRATOR WILL NOTIFY APPROPRIATE SITES OF CHANGES IN CLIENT RECORDS, INCLUDING SSN.

VII. Client Services in Aim:

A. Activity (Service) Listing:

Appendix 6 is a sample listing of Area Agency on Aging Activities and their services being input into AIM. Appendix 7 – VDA 99a Sample - is a sample listing of VDA services reported, grouped by NAPIS categories. Please see your agency's AIM Administrator for a complete listing of Activities for your agency.

B. Service Unit Types and Definitions:

Appendix 8 is a sample listing and definitions of types of service units used by Area Agencies on Aging. Appendix 1 – VDA Services Link to NAPIS Group - is the current listing of services reported to VDA, including types of data to be collected. To keep data collection and input uniform throughout the agency, be aware of the type of information being collected, as noted in the Service Unit Definitions.

C. Service Unit Data Entry

1. General Procedures:

   a) Required information for data entry

      1) Client Identifier (SSN / AIM ID Number)

      2) Activity Identifier (Activity Name or Number)

      3) Date of Service

      4) Service Units (listed by client)

   b) Verify required information is on the roster for all clients before you begin data entry

      1) Look up missing SSN in Aim for NEW CLIENTS and write on roster

      2) Indicate clients on roster that are not yet in AIM

      3) Confirm the Activity, Service Dates(s) and number of units is correct and complete for each client

   c) Quality Control

      1) Mark each service unit on the roster as it is input into AIM

      2) Verify each AIM entry with the written data as you input it! Don't assume it is right until you check it!

      3) Mark the data collection form after data input in AIM:

         (i) AIM

         (ii) Date of data entry

         (iii)Data entry operator's initials

         (iv)If the form is a weekly or monthly list, mark each date column separately on the first page when data entry is complete.

      4) Cross check the data entry total in AIM

         (i) Print the Activity - All Undup report with appropriate date range for the data you are checking.

         (ii) Compare the AIM Report totals to the paper copy total regularly (making adjustments for clients whose data could not be entered into AIM).

         (iii)Follow up on any AIM data that does not match the paper copy totals

   d) Pending Data Entry

      1) Keep a listing of pending data entry for those clients who are not in AIM when service unit is done.

      2) Pending data should be entered as soon as possible after the client is input into AIM.

2. Client Activity Screen

Allows input for individual client with multiple activities and dates

![Client Activity]

a) On the Main Client Screen, with the desired client displayed, click on the Client Activity Button

b) The Client Activity Screen will open in a separate window

   1) Type the desired Date Range in the Service Insert Date Box and click Okay

   2) If there is at least one service for this client in the date range, the service(s will display on the screen.

   3) If there are no services for this client in the date range, AIM displays that message and asks if you want to enter data anyway.

     (i) Click Yes to continue to the Client Activity Screen

     (ii) Click No to return to the Client Main Screen

c) Navigating the Client Activity Screen

   1) Column Display of Service Units

     (i) Fields that can be edited (white background): Service Date, Units

     (ii) Display only fields (gray background): Update, Activity Name, Activity Group, Program Group, Funding Source, NAPIS Group

   2) Toolbar Buttons

     (i) Insert

     (ii) Delete Rec

     (iii)Quick Find

d) Enter Service Units for this Client

   1) Click Insert on the Toolbar (alt+insert)

   2) Select the Activity from the Activity Quick Find and click Okay

     (i) In the Service Insert Box enter the following

     (ii) Type the Service Date of the Activity and hit Tab

     (iii)Type the Number of Units

     (iv)Click Okay or hit Enter

     (v) Verify the completed entry

e) Edit existing Service Units for this Client

1) Click in the Service Date or Units field

2) Edit or change the data

3) If the Activity displayed is wrong, you must delete it and re-enter to correct activity

f) Delete existing Service Units for this Client

1) Click in the row for the Service Unit you wish to delete

2) Click Delete Rec on the Toolbar (alt+delete)

3) Only the current row will be deleted

3. Service Screen

Allows input for multiple clients with multiple dates in a single activity

a) Go to the Service Screen: Screens > Client > Service
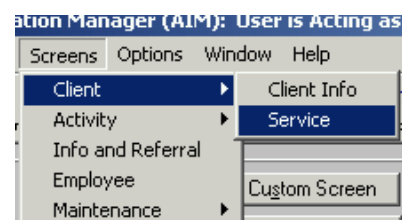
1) The Activity Quick Find will be displayed

(i) Select the desired activity

(ii) Fill in the date range you wish to retrieve data for

2) If there is at least one service for this activity in the date range, the client(s) will display on the screen.

3) If there are no services for this activity in the date range, AIM displays that message and asks if you want to enter data anyway.

(i) Click Yes to continue to the Activity Screen

(ii) Click No to return to the Client Main Screen

b) The Activity Screen will open in a separate window
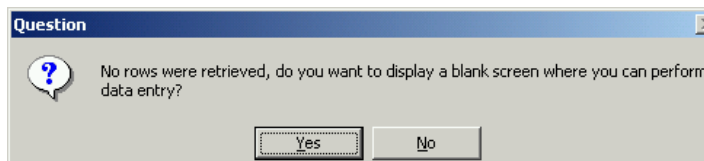
c) Navigating the Activity Screen

1) Column Display of Client Service Units

(i) Fields that can be edited (white background): Units, Last Service Date

(ii) Display only fields (gray background): Last Name, First Name, Sex, Marital Status, Race, Status

2) Toolbar Buttons

(i) Insert

(ii) Delete Rec

(iii) Quick Find

d) Enter Client Service Units for this Activity

1) Click Insert on the Toolbar (alt+insert)
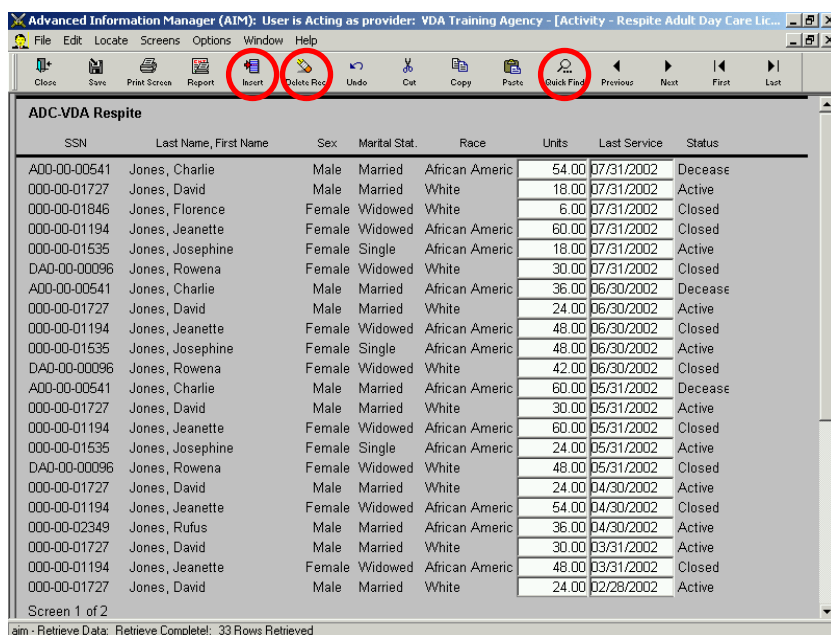
2) Select the Client from the Client Quick Find and click Okay

    (i) In the Service Insert Box enter the following

    (ii) Type the Service Date of the Activity and hit Tab

    (iii)Type the Number of Units

    (iv)Click Okay or hit Enter

    (v) Verify the completed entry

e) Edit existing Client Service Units for this Activity

  1) Click in the Units or Last Service Date field

  2) Edit or change the data

  3) If the client displayed is wrong, you must delete the record and re-enter to select the correct client

f) Delete existing Client Service Units for this Activity

  1) Click in the row for the Client Service Unit you wish to delete

  2) Click Delete Rec on the Toolbar (alt+delete)

  3) Only the current row will be deleted

4. Import Screen

Uses CCD keyboard scanner and bar-coded activity rosters to quickly input service units for multiple clients with multiple date/activity entries

VIII. AIM Reports:

A. Report selection:

1. On the Toolbar, click on the Report Button

2. From the Report Quick Find, select the desired report

  a) Sort the Report list by the desired Type of Search

  b) Type the first few letters of the Report ID or Name in the Find box

  c) Click Okay or double click on the Report Name in the list

  d) Make selection(s) for any criteria questions presented for the report

    1) Date Range(s) for Activities or Assessments

    2) Activity, Activity Group, Program Group, or NAPIS Group Quick Find

    3) Provider

B. Navigate the Report Screen

1. Zoom (Report Display size)

  a) Click one of the preset Zoom radio buttons to change the size of the screen display of the report
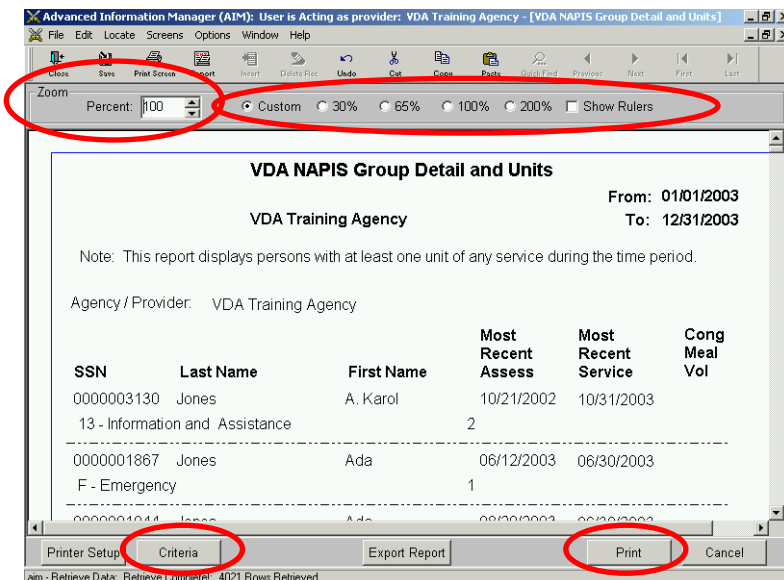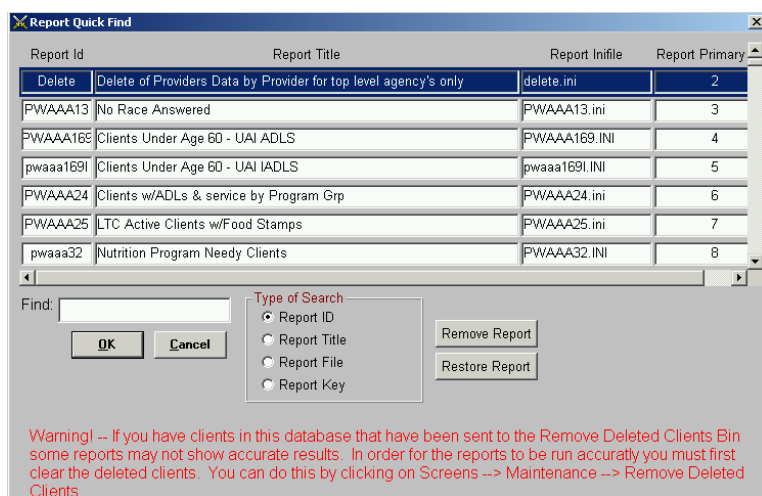
b) Custom Size

    1) Click the Custom Zoom radio button

    2) Change Percent to display the report at a custom size

2. Move within the displayed Report

  a) Click in the Report Display to activate the Screen, scroll bar and mouse scroll wheel

  b) Single click on the Navigation Buttons on the Toolbar

    1) Previous, Next, First, Last

    2) The selected report page will be displayed in the current window

  c) Use the scroll bar or mouse wheel to scroll through the report

3. Report Buttons (Bottom Section)

  a) Printer Setup

  b) Print

  c) Export Report

  d) Criteria

  e) Cancel

C. Print Reports

1. With the desired report displayed, single click on the Print Button in the bottom section of the Report Screen

2. Make appropriate selections in the Print Specifications Window, and click Okay

D. Report Types

1. Activity Rosters

  a) Pre-select clients for activity roster

    1) Use pre-select to

      (i) add (pre-register) clients for a new activity

      (ii) delete clients from pre-existing roster

    2) Client(s) pre-select by Activity

      (i) Go to Roster by Activity Screen: Screens > Activity > Roster by Activity

      (ii) Pre-select clients from Client Quick Find

      (iii) Auto Select: select clients with this activity in a date range

    3) Activity(s) Pre-select by Client

      (i) Client Main Screen: Roster by Client Button

      (ii) Pre-select activities for single client from Activity Quick Find

    4) ONLY ACTIVE CLIENTS WILL PRINT ON LIST: If client doesn't appear on roster after you've added them to list, check client status on client screen.

    b) Print Activity Rosters
       1) SC01 - 03
2. Summary of Activities
    a) Activities for a single client in a date range (SC48) (Appendix 11)
    b) Activities for all clients (SC 35, VA352, VA111)
    c) Activity Group (SC36)
    d) Program Group (SC05)
    e) NAPIS Group (VA115)
3. Misc. Reports
    a) UAI (SC54, VA53 –pg 1-4 or VA54- all pages)
    b) Labels: (SC25 - 29)
    c) List of Client Birthdays (SC18 or 19)
    d) Nutrition Health Screening Summary (from UAI questions) (SC06 or 07, VA06)
4. VDA Reports (Required)

Report samples found in Appendixes 12-18
    a) VA01: VDA Annual NAPIS Summary for All Title III Services
       1) VA02: Client Listing and Details for VA01
    b) VA11: VDA Clients Receiving Services Without a Recent Assessment
    c) VA26:VDA NAPIS Group – Individuals Under 60 and Units Detail
    d) VA36: VDA Title IIIE Program Group Listing (Caregivers/Clients)
    e) VA95: VDA NAPIS Group – Individuals and Units
    f) VA115: VDA Activity Details and Units

IX. Record Storage for AIM

A. Paper Audit Trail of AIM Data

All Agency on Aging sites will keep paper records of the AIM data, including UAI and Service Unit information. This provides the original data documentation to verify the electronic data for audits from VDA. ALL ORIGINAL PAPER DOCUMENTATION OF SERVICE UNITS SHOULD BE KEPT FOR AT LEAST TWO FULL YEARS! This will also enable the AIM Administrator to reconstruct the data if the computer data and computer backups are lost.

1. Completed data entry should be documented on original paperwork
2. Data Collection records: KEEP FOR TWO (2) FULL YEARS (not including current fiscal year)
    a) Original UAI's
    b) Service unit rosters or attendance lists
    c) Other documentation as needed
3. Monthly Summaries or Reports: Keep for three (3) full years (not including current fiscal year)
4. Yearly Reports: Keep for five (5) years

B. Computer Data File Backup
1. The AIM Administrator is responsible for the backup of the database file for the AIM data.
2. Daily backups of the database file are normally done at midnight.
3. Computer backup files should be stored on CDs or other removable media, using the same guidelines as the paper records.

X. Appendix

1. VDA Services Link to AIM NAPIS Group
2. Nutritional Health Screening
3. VDA EZ Quick Form
4. VDA Caregiver Form
5. VDA City/ County Codes
6. Sample Activity Listing for AAA Services
7. VA99a: AIM Verify Activity to NAPIS Group Mapping
8. Service Unit Definitions Sample
9. SC01: Activity Roster (Monthly)
10. SC03: Activity Roster (Weekly)
11. SC48: List of Activities by Client
12. VA01: VDA Annual NAPIS Summary for All Title III Services
13. VA02: Client Listing and Details for VA01
14. VA11: VDA Clients Receiving Services Without a Recent Assessment
15. VA26: VDA NAPIS Group – Individuals Under 60 and Units Detail
16. VA36: VDA Title IIIE Program Group Listing (Caregivers/Clients)
17. VA95: VDA NAPIS Group – Individuals and Units
18. VA115: VDA Activity Details and Units

Virginia Department for the Aging
VDA Services Link to AIM NAPIS Group

Service to Client Except Title III-E	Unit to Track	NAPIS Group Mapping	Client Minimum Required Assessment	Client Nutritional Screening	Client In Federal Poverty?
Adult Day Care	Individual Hours	05 – Adult Day Care/ Health	Full		**Required
Care Coordination	Individual Hours	06 – Case Management	Full	Required	**Required
Checking	Contacts	D – Checking	Quick Form		**Required
Chore	Individual Hours	03 – Chore	Part A		**Required
Congregate Nutrition	Eligible Meals	07 – Congregate Meals	Page 1-3 (* see note)	Required	**Required
Disease Prevention/Health Promotion	Individual Hours	B – Disease Prevention/Health	Quick Form		**Required
Elder Abuse	Contacts	Protect Elder Rights	Quick Form		**Required
Emergency	Contacts	F – Emergency	Quick Form		**Required
Employment Title III	Individual Hours	F – Employment Title III	Quick Form		**Required
Health Education/Screening	Individual Hours	B – Health Education/Screening	Quick Form		**Required
Home Delivered Nutrition	Meals	04 – Home Delivered Meals	Part A	Required	**Required
Home Delivered Meals – Fee for Service	Non NSIP Meals	Fee for Service – Home Delivered	Part A	Required	**Required
Home Health	Individual Hours	B – Home Health	Full		**Required
Homemaker	Individual Hours	02 – Homemaker	Part A		**Required
Identification/Discount	Cards Issued	F – Identification/Discount	Quick Form		**Required
Information and Referral/Assistance	Contacts	13 – Information and Assistance	Quick Form		**Required
Legal Assistance	Individual Hours	11 – Legal Assistance	Quick Form		**Required
Medication Management	Individual Hours	B – Medication Management	Quick Form		**Required
Money Management	Individual Hours	F – Money Management	Quick Form		**Required
Personal Care	Individual Hours	01 – Personal Care	Full		**Required
Residential Repair and Renovation	Homes Repaired	A – Residential Repair and Renovation	Quick Form		**Required
Socialization/Recreation	Individual Hours	D – Socialization/Recreation	Quick Form		**Required
Transportation	One-way Trips	10 – Transportation	Quick Form		**Required
Volunteer Programs	Volunteer Hours	D – Volunteer Programs	Quick Form		**Required

Virginia General Fund Respite Care Initiative
Title III-E / Caregiver NAPIS group items that go into effect 10/01/2004

Virginia Department for the Aging
VDA Services Link to AIM NAPIS Group

Service to Client	Unit to Track	NAPIS Group Mapping	Client Minimum Required Assessment	Client Nutritional Screening	Client In Federal Poverty?
Adult Day Care License	Individual Hours	Respite Adult Day Care License	Full		**Required
Companion	Individual Hours	Respite Companion	Full		**Required
Home Health	Individual Hours	Respite Home Health	Full		**Required
Homemaker	Individual Hours	Respite Homemaker	Full		**Required
Hospice	Individual Hours	Respite Hospice	Full		**Required
Personal Care	Individual Hours	Respite Personal Care	Full		**Required
Other	Individual Hours	Respite Other	Full		**Required
Care Coordination for Elderly Virginians ***	Individual Level B Hours	CCEVP	Full	Required	**Required
Guardianship	Not Required	Guardianship	Full		**Required

* Volunteers during meal time of Congregate Nutrition are an exception to the required assessment. The only information to be tracked for Congregate Nutrition volunteers is full name and units of service.

** The question "In Federal Poverty?" the answer is a required data field starting 10/01/2002 in AIM. The documents used to capture this information can be either the "Virginia Service – Quick Form" or "Federal Poverty / VDA Sliding Fee Scale" for the appropriate year.

*** Care Coordination / Case Management and CCEVP require the "Care Coordination Outcome" form information to be collected. However, this information is not required to be input into AIM.

Note 1: The only group service tracked in AIM is Caregiver Public Information / Education.

Note 2: Reassessments should be performed annually or when the person's condition has changed significantly. The exception to this rule is Care Coordination / Case Management, which is performed every six months or when the person's condition has changed significantly.

Note 3: Further information can be found on the services tracked in AIM by referring to individual service standards or "The National Family Caregiver Support Program Guidance".

▨ Virginia General Fund Respite Care Initiative
▨ Title III-E / Caregiver NAPIS group items that go into effect 10/01/2004

Virginia Department for the Aging
VDA Services Link to AIM NAPIS Group

Title III-E Only Services

(Please do not remap Title III-E services used in fiscal year ending September 30, 2004)

Note: The "Virginia Caregiver – Service Form" should be collected from each caregiver for all Title III-E services except "Caregiver Public Information/Education"

Title III-E Service	Unit to Track	NAPIS Group Mapping	Client Min. Required Assessment	Program Group Mapping	Client Nutritional Screening	Client In Federal Poverty?
Caregiver Adult Day Care Respite	Individual Hours	Caregiver Respite Care	Full	III-E Adult Day Care - Respite		**Required
Caregiver Assisted Transportation	One-way Trips	Caregiver Access Assistance	Part A	III-E Assisted Transportation – AA		**Required
Caregiver Care Coordination	Individual Hours	Caregiver Access Assistance	Full	III-E Care Coordination – AA	Required	**Required
Caregiver Caregiver Training	Sessions	Caregiver Counseling/Support Groups/Caregiver Training	Quick Form	III-E Caregiver Training - Counseling		**Required
Caregiver Chore	Individual Hours	Caregiver Supplemental Programs	Part A	III-E Chore - SS		**Required
Caregiver Congregate Nutrition	Eligible Meals	Caregiver Supplemental Programs	Page 1-3 see ▼	III-E Congregate Nutrition - SS	Required	**Required
Caregiver Direct Payment - Respite	One Payment	Caregiver Respite Care	Part A	III-E Direct Payment - Respite		**Required
Caregiver Direct Payment - Supplemental Services	One Payment	Caregiver Supplemental Programs	Part A	III-E Direct Payment - SS		**Required
Caregiver Home Delivered Nutrition	Meals	Caregiver Supplemental Programs	Part A	III-E HD Nutrition - SS	Required	**Required
Caregiver Homemaker Respite	Individual Hours	Caregiver Respite Care	Part A	III-E Homemaker - Respite		**Required
Caregiver Individual Counseling	Sessions	Caregiver Counseling/Support Groups/Caregiver Training	Quick Form	III-E Individual - Counseling		**Required
Caregiver Information & Referral/Assistance	Individual Contacts	Caregiver Access Assistance	Quick Form	III-E Info & Referral/Assistance – AA		**Required
Caregiver Institutional Respite	Individual Hours	Caregiver Respite Care	Part A	III-E Institutional - Respite		**Required
Caregiver Other Respite	To Be Defined	Caregiver Respite Care	Part A	III-E Other - Respite		**Required
Caregiver Other – Supplemental Services	To Be Defined	Caregiver Supplemental Programs	Part A	III-E Other - SS		**Required
Caregiver Personal Care Respite	Individual Hours	Caregiver Respite Care	Full	III-E Personal Care - Respite		**Required
Caregiver Public Information / Education	Estimated Audience	Caregiver Information Services	None	III-E Public Information / Education		
Caregiver Support Groups	Sessions	Caregiver Counseling/Support Groups/Caregiver Training	Quick Form	III-E Support Groups - Counseling		**Required
Caregiver Transportation	One-way Trips	Caregiver Access Assistance	Quick Form	III-E Transportation – AA		**Required

▼ To be eligible for Title III-E Congregate Nutrition, the client must be receiving an additional service that collects Part A of the UAI or Page 4 must be collected as well.

Note: For services mapped to Caregiver Respite Care or Caregiver Supplemental Services, the client must have two or more ADLs.

Virginia General Fund Respite Care Initiative
Title III-E / Caregiver NAPIS group items that go into effect 10/01/2004

AIM Services to NAPIS.doc

Revised 11/30/2005

Nutritional Health Screening Survey

This screening tool was developed by the Nutrition Screening Initiative

Date: _____

CLIENT NAME: _____   SSN: _____

Directions: Enter the number of points allowed for each question that you would answer as 'yes' in the Points Earned column, enter 0 for a 'no' answer. Add up your points to get your total nutritional score. Use your total score to see how well you do on the nutritional risk scale.

Points Allowed	Points Earned	
2	_____	I have an illness or condition that made me change the kind and/or amount of food I eat.
3	_____	I eat fewer than two meals per day.
2	_____	I eat few fruits or vegetables, or milk products.
2	_____	I have three or more drinks of beer, liquor or wine almost every day.
2	_____	I have tooth or mouth problems that make it hard for me to eat.
4	_____	I don't always have enough money to buy the food I need.
1	_____	I eat alone most of the time.
1	_____	I take three or more different prescribed or over-the-counter drugs a day.
2	_____	Without wanting to, I have lost or gained ten pounds in the last six months.
2	_____	I am not always physically able to shop, cook and/or feed myself.
Your Total	_____	If your total nutritional score is:

Total Score

0-2   **Good!** Recheck your nutritional score in six months

3-5   **You are at moderate nutritional risk.** See what can be done to improve your eating habits and lifestyle. Your office on aging, senior nutrition program, senior citizens center or health department can help. Recheck your nutritional score in three months.

6 or more   **You are at high nutritional risk.** Bring this checklist the next time you see your doctor, dietitian or other qualified health or social service professional. Talk with them about any problems you may have. Ask for help to improve your nutritional health.

VIRGINIA SERVICE – QUICK FORM

Today's Date _____/_____/_____

Updated _____/_____/_____

Client Name & Demographic Information

Name: _____
           (Last)   (First)   (Middle Initial)

Address: _____
               (Street)

_____
      (City)   (State)   (Zip)

Phone: (____) _____   County or City of Residence: _____

Social Security Number: _____-_____-_____   Is There a Caregiver? Yes ____ No ____

Birthdate: _____/_____/_____   Gender: ____ Male   ____ Female
      (Month) (Day) (Year)

Race Status:

____ White or Caucasian Only   ____ Black / African American Only   ____ American Indian or Alaskan Native Only

____ Asian Only   ____ Native Hawaiian or Pacific Islander Only   ____ Some Other Race Only

____ Two or More Races Combined   ____ Race Unknown or Unreported

Hispanic Origin:

____ Hispanic or Latino Origin **OR** _____ **Not** Hispanic or Latino Origin **OR** _____ Hispanic Ethnicity Unknown

Physical Environment

Financial Resources

_____ No one else lives in my home

_____ Yes, I live with someone

Number of members in immediate family: _____

Total monthly income of immediate family: $ _____

In Federal Poverty?   Yes ____   No ____

Sliding Fee Scale Level? A____ B____ C____ D____ E____ F____ G____
  (If applicable)

For Office Use Only
Services Requested:

_____
_____

Services Provided:

_____
_____
_____

Agency / Provider: _____   PSA No. _____

NOTE: At a minimum, this form must be updated annually in order for a client to continue service.

VIRGINIA CAREGIVER – SERVICE FORM

Today's Date _____/_____/_____

Updated _____/_____/_____

Caregiver Name & Demographic Information

Caregiver Name: _____
                       (Last)   (First)   (Middle Initial)

Address: _____
           (Street)   (Apartment Number)

_____
      (City)   (State)   (Zip)

Phone: ( ) _____   County/City of Residence: _____

Caregiver Social Security Number: _____

Caregiver Birthdate: _____/_____/_____   _____ Male   _____ Female
                (Month) (Day) (Year)

Caregiver Race and Hispanic Status:

_____ White or Caucasian Only   _____ Black / African American Only   _____ American Indian or Alaskan Native Only

_____ Asian Only   _____ Native Hawaiian or Pacific Islander Only   _____ Some other Race Only

_____ Two or More Races Combined   _____ Race unknown or unreported

_____ Hispanic or Latino Origin **OR**
_____ **Not** Hispanic or Latino Origin **OR**
_____ Hispanic ethnicity **unknown**

Caregiver Relationship to Client:

_____ Husband (Spouse)   _____ Wife (Spouse)

_____ Son   _____ Daughter   _____ Other Relative (e.g. Sibling)

_____ Grandparent   _____ Non-Relative   _____ Non-Relative Legal Guardian or Custodian

Does Caregiver Live with Client?   _____ Yes   _____ No

Client Information

Client's Name: _____
              (Last)   (First)   (Middle Initial)

Client's Social Security Number: _____ Client's Birthdate: _____/_____/_____
                                           (Month) (Day) (Year)

For Office Use Only

Services Requested:
_____
_____

Services Provided:
_____

Agency / Provider: _____ PSA No. _____

NOTE: At a minimum, this form must be updated annually in order for a client/caregiver to continue service.

AIM County Field
Virginia City/County Codes

COUNTIES

Accomack - 001 *
Albemarle – 003
Alleghany - 005 *
Amelia - 007 *
Amherst – 009
Appomattox - 011 *
Arlington – 013
Augusta – 015
Bath - 017 *
Bedford Co. *
Bland - 021 *
Botetourt – 023
Brunswick - 025 *
Buchanan - 027 *
Buckingham - 029 *
Campbell – 031
Caroline - 033 *
Carroll - 035 *
Charles City - 036 *
Charlotte - 037 *
Chesterfield – 041
Clarke - 043 *
Craig - 045 *
Culpeper - 047 *
Cumberland - 049 *
Dickerson - 051 *
Dinwiddie - 053 *
Essex - 057 *
Fairfax Co. – 059
Fauquier - 061 *
Floyd - 063 *
Fluvanna - 065 *
Franklin Co. - 067 *
Frederick - 069 *
Giles - 071 *
Gloucester – 073
Goochland -075 *
Grayson - 077 *
Greene – 079
Greensville - 081 *
Halifax - 083 *
Hanover – 085
Henrico – 087
Henry - 089 *
Highland - 091 *
Isle of Wight - 093*
James City – 095
King and Queen -097*
King George - 099 *

King William - 101 *
Lancaster - 103 *
Lee - 105 *
Loudoun – 107
Louisa - 109 *
Lunenburg - 111 *
Madison - 113 *
Mathews - 115 *
Mecklenburg - 117 *
Middlesex - 119 *
Montgomery - 121
*Nelson - 125 *
New Kent - 127 *
Northhampton - 131 *
Northumberland -133*
Nottaway - 135 *
Orange - 137 *
Page - 139 *
Patrick - 141 *
Pittsylvania – 143
Powhatan – 145
Prince Edward - 147*
Prince George – 149
Prince William – 153
Pulaski - 155 *
Rappahannock - 158*
Richmond Co. - 159 *
Roanoke Co. – 161
Rockbridge - 163 *
Rockingham - 165 *
Russell - 167 *
Scott - 169 *
Shenandoah - 171 *
Smyth - 173 *
Southampton - 175 *
Spotsylvania - 177 *
Stafford – 179
Surry - 181 *
Sussex - 183 *
Tazewell - 185 *
Warren - 187 *
Washington – 191
Westmoreland -193 *
Wise - 195 *
Wythe - 197 *
York – 199

CITIES

Alexandria – 510
Bedford City - 515 *
Bristol –520
Buena Vista - 530 *
Charlottesville –540
Chesapeake – 500
Clifton Forge - 560*
Colonial Heights-570
Covington - 580 *
Danville – 590
Emporia - 595 *
Fairfax City –600
Falls Church – 610
Franklin City - 620*
Fredericksburg -630*
Galax - 640 *
Hampton – 650
Harrisonburg - 660 *
Hopewell – 670
Lexington - 678 *
Lynchburg – 680
Manassas – 683
Manassas Park – 685
Martinsville - 690 *
Newport News – 700
Norfolk – 710
Norton - 720 *
Petersburg – 730
Poqouson – 735
Portsmouth – 740
Radford - 750 *
Richmond City – 760
Roanoke City – 770
Salem – 775
Staunton - 790 *
Suffolk – 800
Virginia Beach – 810
Waynesboro - 820 *
Williamsburg – 830
Winchester - 840 *

OUTSIDE VIRGINIA
Other

Sample Activities Listing for AAA Programs

I. Adult Day Care
- A. Program Participation
  1. Respite Care
  2. Non-Respite Care
- B. Transportation
- C. ADC Meals
  1. ADC Meal
  2. Catered Meal

II. Nutrition Program
- A. Congregate Meals
  1. Participant Meals
  2. Senior Guest Meals
- B. Non-Senior Meals
  1. Staff/ Non-Senior Guest Meals
- C. Home Delivered Meals Program
  1. Ensure Meals
  2. Hot Daily Meals

III. Senior Assist Program
- A. Assistance & Information
  1. Screening
  2. Erickson Level A Contacts
  3. Smith Level A Contacts
  4. Jones Level A Contacts
- B. Case Management
  1. Erickson Level B Hours
  2. Smith Level B Hours
  3. Jones Level B Hours
  4. Erickson Level B Contacts
  5. Smith Level B Contacts
  6. Jones Level B Contacts

IV. Long Term Care Services
- A. In Home Services
  1. Chore Service
  2. Homemaker
  3. Personal Care
  4. Respite Care
- B. LTC Support Services
  1. Dental Program
  2. Emergency Funds

V. Senior Center Services
- A. Socialization & Recreation
  1. Bible Study
  2. Bridge Club
  3. Horseshoes
  4. Ping Pong
  5. Special Events
- B. Transportation
  1. Transportation
- C. Continuing Education
  1. Computer Class
  2. Craft Class
  3. ESL class
- D. Group Meetings
  1. AARP
  2. Couple Club
  3. Singles Club
- E. Health/Wellness Activities
  1. Blood Pressure Screening
  2. Fitness Class
  3. Health Assessment
  4. Health Fair

- F. Individual Client Services
  1. Loan Closet
  2. Food Bank
  3. Telephone Reassurance

VI. Volunteers
- A. Adult Day Care
  1. Adult Day Care Volunteer Hours
- B. Bluebird Tour Program
  1. Bluebird Office Volunteer Hours
  2. Bluebird Trip Volunteer Hours
- C. Friendly Visitor Program
  1. Friendly Visitor Hours
  2. Advisor/Councilor Hours
  3. Guardianship Hours
- D. Nutrition Program
  1. Home Delivered Meals Volunteer Hours
  2. Nutrition Program Volunteer Hours
- E. Senior Centers
  1. Community Service Volunteer Hours
  2. Receptionist Volunteer Hours
  3. Instructor Volunteer Hours
- F. VICAP
  1. Medicare Part D Client Assessment
  2. Insurance Presentation
  3. Insurance Counseling

VDA - AIM Verify Activity to NAPIS Group Mapping

Napis Catagory ID	Napis Group Description
	Activity Description

1 01 - Personal Care

PC-IIIB

4 04 - Home Delivered Meals

EA-Food
HDM-Cereal
HDM-Frozen
HDM-Hot
HDM-Saturday
Supplement

5 05 - Adult Day Care /Health

ADC-IIIB

7 07 - Congregate Meals

Cereal-Buckroe
Cereal-Clark
Cereal-Denbigh
Cereal-Hampton
Cereal-Hilton
Cereal-HTSC
Cereal-Marshall
Cereal-Poquoson
Cereal-York
Cong-Buckroe
Cong-Clark
Cong-DDC
Cong-Denbigh
Cong-Hampton
Cong-Hilton
Cong-HTSC
Cong-KofC
Cong-Korean-Peninsula
Cong-Korean-World
Cong-Marshall
Cong-Mid Town
Cong-Monty
Cong-Oasis
Cong-Poquoson
Cong-Sunrise ADC
Cong-UJCC
Cong-WDC
Cong-York

10 10 - Transportation

Trans-Buckroe
Trans-Clark
Trans-DDC

10 10 - Transportation

Trans-Denbigh
Trans-FG
Trans-Hilton
Trans-HptADC
Trans-HptSrCtr
Trans-HTSC
Trans-LangleyVillage
Trans-LincolnTowers
Trans-Marshall
Trans-Med
Trans-Mid Town
Trans-PaulaMaria
Trans-Poquoson
Trans-Scotland St
Trans-SetonManor
Trans-Special
Trans-SunrADC
Trans-Tidewater
Trans-York

11 11 - Legal Assistance

Legal Assistance

13 13 - Information and Assistance

CC Inf-I&A
I & A - PAA

16 B - Disease Prevention/Health Promotion

Health Promotion

44 B - Medication Management

Med Mgt

102 Caregiver Respite Care

ADC-IIIE
PC-IIIE

38 CCEVP

CCEVP-NNRHA(Hours)
CCEVP-PAA(Hours)
CCEVP-SHARP(Hours)

20 F - Emergency

EA-Cooling Asst.
EA-Fan Care
EA-IIIB

34 Fee for Service Home Delivered Nutrition

Frozen FFS

VDA - AIM Verify Activity to NAPIS Group Mapping

34 Fee for Service Home Delivered Nutrition

HDM-FFS
Supplement-FFS

36 Fee for Service Personal Care

PC-FFS

37 Fee for Service Transportation

Trans-FFS
Trans-MedFFS

39 Local AAA

ADC-Male Caregiver
ADC-SHARP
CC Inf-HRHA
CC Inf-HRHA<60
CC Inf-NNRHA
CC Inf-NNRHA<60
CC Inf-SHARP
CCEVP-NNRHA(Contacts)
CCEVP-PAA(Contacts)
CCEVP-SHARP(Contacts)
Companion-HRHA
Companion-NNRHA
Data Entry
EAP(Hours)
HDM-Bernadine
HDM-SHARP
HDM-Under 60
I & A - SHARP
LevA Int
LevB as/re-PAA
PC - Bruton
PC-HRHA
PC-Male Caregiver
PC-NNRHA
PC-SHARP
Supplement-Grant
Supplement-Under 60
Trans-MedTeam<60
Trans-MedTeam60+
Trans-MedTran
Trans-PoqAI <60
Trans-PoqAI 60+
Trans-State-Tax
Trans-YorkGr <60
Trans-YorkGr 60+

39 Local AAA

Under 60 - trans
Under 60-Cong

17 Protect Elder Rights

EAP(Contacts)

21 Respite Adult Day Care License

ADC-VDA Respite

27 Respite Personal Care

PC-R
PC-R/D

Total Activity Types: 118

Sample Service Unit Types and Definitions

Service type	Unit	Suggested Frequency of Data Entry	Service Unit Definition (all service units are tracked/entered by individual client)
Adult Day Health Care participation	one hour	Monthly Total	Total Hours served: Track start and end time each day, calculate hours of use to the nearest quarter hour
Class	one hour	Daily Total	Total Hours for class Track start and end time each day, calculate hours of use to the nearest quarter hour
Case Management Hours	one hour	Monthly Total	Track total number of hours served by Case Manager during a month FOR EACH INDIVIDUAL CLIENT (contact with client or other on behalf of client – regardless of type of contact), calculate total hours of service per client to the nearest quarter hour
Client Contacts	one contact	Monthly Total	Track total number of contacts during a month FOR EACH INDIVIDUAL CLIENT (contact with client or other on behalf of client – regardless of type or length of contact)
In Home Services	one hour	Monthly Total	Total hours served: track start and end time each use, calculate hours of use to the nearest quarter hour
Health Service or Screening	one activity	Monthly Total	one unit per Service/Screening received (regardless of length of service given – tracks actual number of services given)
Meals	one meal	Daily Total	One meal (1/3 RDA) or one can of Ensure
Newsletters or Publications	one unit	Monthly Total	Track total number of pieces distributed during a month BY Subject
Social or Recreational Activities	one activity	Monthly Total	one unit per activity attended (regardless of length of activity- assumes average of 1 hour per activity)
Transportation	one trip	Daily Total	A one way trip (ex.: from the senior's house to the senior center)

Activity Roster for: VDA Training Agency

Act: Trans-Buckroe Grp: Transportation Pgm: Transportation FS:- Title III-B NAPIS: 10 - Transportation

Start Date: January, 10 2006	Instructor:	Act Barcode: ‖‖‖‖‖‖‖‖‖‖‖‖‖ 1230204

‖‖‖‖‖‖‖‖‖‖‖‖‖   1| 2| 3| 4| 5| 6| 7| 8| 9| 10| 11| 12| 13| 14| 15| 16| 17| 18| 19| 20| 21| 22| 23| 24| 25| 26| 27| 28| 29| 30| 31
Jones, Abraham, Jr. 000-00-01700

‖‖‖‖‖‖‖‖‖‖‖‖‖   1| 2| 3| 4| 5| 6| 7| 8| 9| 10| 11| 12| 13| 14| 15| 16| 17| 18| 19| 20| 21| 22| 23| 24| 25| 26| 27| 28| 29| 30| 31
Jones, Adaline A00-00-00450

‖‖‖‖‖‖‖‖‖‖‖‖‖   1| 2| 3| 4| 5| 6| 7| 8| 9| 10| 11| 12| 13| 14| 15| 16| 17| 18| 19| 20| 21| 22| 23| 24| 25| 26| 27| 28| 29| 30| 31
Jones, Alice 000-00-02178

‖‖‖‖‖‖‖‖‖‖‖‖‖   1| 2| 3| 4| 5| 6| 7| 8| 9| 10| 11| 12| 13| 14| 15| 16| 17| 18| 19| 20| 21| 22| 23| 24| 25| 26| 27| 28| 29| 30| 31
Jones, Armetha A00-00-00861

‖‖‖‖‖‖‖‖‖‖‖‖‖   1| 2| 3| 4| 5| 6| 7| 8| 9| 10| 11| 12| 13| 14| 15| 16| 17| 18| 19| 20| 21| 22| 23| 24| 25| 26| 27| 28| 29| 30| 31
Jones, Donita 000-00-01115

‖‖‖‖‖‖‖‖‖‖‖‖‖   1| 2| 3| 4| 5| 6| 7| 8| 9| 10| 11| 12| 13| 14| 15| 16| 17| 18| 19| 20| 21| 22| 23| 24| 25| 26| 27| 28| 29| 30| 31
Jones, Doris 000-00-02002

‖‖‖‖‖‖‖‖‖‖‖‖‖   1| 2| 3| 4| 5| 6| 7| 8| 9| 10| 11| 12| 13| 14| 15| 16| 17| 18| 19| 20| 21| 22| 23| 24| 25| 26| 27| 28| 29| 30| 31
Jones, Dorothy 000-00-01726

‖‖‖‖‖‖‖‖‖‖‖‖‖   1| 2| 3| 4| 5| 6| 7| 8| 9| 10| 11| 12| 13| 14| 15| 16| 17| 18| 19| 20| 21| 22| 23| 24| 25| 26| 27| 28| 29| 30| 31
Jones, Edena 000-00-02801

‖‖‖‖‖‖‖‖‖‖‖‖‖   1| 2| 3| 4| 5| 6| 7| 8| 9| 10| 11| 12| 13| 14| 15| 16| 17| 18| 19| 20| 21| 22| 23| 24| 25| 26| 27| 28| 29| 30| 31
Jones, Essie A00-00-00549

‖‖‖‖‖‖‖‖‖‖‖‖‖   1| 2| 3| 4| 5| 6| 7| 8| 9| 10| 11| 12| 13| 14| 15| 16| 17| 18| 19| 20| 21| 22| 23| 24| 25| 26| 27| 28| 29| 30| 31
Jones, Mamie A00-00-00143

‖‖‖‖‖‖‖‖‖‖‖‖‖   1| 2| 3| 4| 5| 6| 7| 8| 9| 10| 11| 12| 13| 14| 15| 16| 17| 18| 19| 20| 21| 22| 23| 24| 25| 26| 27| 28| 29| 30| 31
Jones, Minnie A00-00-00440

‖‖‖‖‖‖‖‖‖‖‖‖‖   1| 2| 3| 4| 5| 6| 7| 8| 9| 10| 11| 12| 13| 14| 15| 16| 17| 18| 19| 20| 21| 22| 23| 24| 25| 26| 27| 28| 29| 30| 31
Jones, Sylvia A00-00-00269

‖‖‖‖‖‖‖‖ 1   ‖‖‖‖‖‖‖‖ 2   ‖‖‖‖‖‖‖‖ 3   ‖‖‖‖‖‖‖‖ 4   ‖‖‖‖‖‖‖‖ 5   ‖‖‖‖‖‖‖‖ 10

‖‖‖‖‖‖‖‖ 18   ‖‖‖‖‖‖‖‖ 19   ‖‖‖‖‖‖‖‖ 20   ‖‖‖‖‖‖‖‖ 21   ‖‖‖‖‖‖‖‖ 22

Activity Roster for: VDA Training Agency

Act: Trans-Buckroe Grp: Transportation Pgm: Transportation FS:- Title III-B NAPIS: 10 - Transportation

| Start Date: January, 10 2006 | Instructor: | | | | | Act Barcode: | 1230204 |

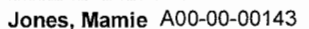| | Mon| Tue| Wed| Thu| Fri| Sat| Sun| |
|---|---|---|---|---|---|---|---|---|
| Jones, Abraham, Jr. 000-00-01700 | Mon| Tue| Wed| Thu| Fri| Sat| Sun| |
| Jones, Adaline A00-00-00450 | Mon| Tue| Wed| Thu| Fri| Sat| Sun| |
| Jones, Alice 000-00-02178 | Mon| Tue| Wed| Thu| Fri| Sat| Sun| |
| Jones, Armetha A00-00-00861 | Mon| Tue| Wed| Thu| Fri| Sat| Sun| |
| Jones, Donita 000-00-01115 | Mon| Tue| Wed| Thu| Fri| Sat| Sun| |
| Jones, Doris 000-00-02002 | Mon| Tue| Wed| Thu| Fri| Sat| Sun| |
| Jones, Dorothy 000-00-01726 | Mon| Tue| Wed| Thu| Fri| Sat| Sun| |
| Jones, Edena 000-00-02801 | Mon| Tue| Wed| Thu| Fri| Sat| Sun| |
| Jones, Essie A00-00-00549 | Mon| Tue| Wed| Thu| Fri| Sat| Sun| |
| Jones, Mamie A00-00-00143 | Mon| Tue| Wed| Thu| Fri| Sat| Sun| |
| Jones, Minnie A00-00-00440 | Mon| Tue| Wed| Thu| Fri| Sat| Sun| |
| Jones, Sylvia A00-00-00269 | Mon| Tue| Wed| Thu| Fri| Sat| Sun| |

1   2   3   4   5   10

18   19   20   21   22

VDA Training Agency

000-00-017(Jones, Abraham, Jr.

Served by Agency: VDA Training Agency

Service Date	Units	Activity	Activity Description
05/10/2004	1.00	1230308	Data Entry
05/31/2004	10.00	1230291	HDM-Frozen
06/30/2004	10.00	1230291	HDM-Frozen
06/30/2004	2.00	1230305	I & A - PAA
07/31/2004	10.00	1230291	HDM-Frozen
08/31/2004	10.00	1230291	HDM-Frozen

Total units provided: 43.00

VDA - Annual NAPIS Summary for All Title III Services

Agency / Provider: VDA Training Agency

UNDUPLICATED COUNTS OF PERSONS SERVED

Total Unduplicated Count of Persons Served in ALL Title III Funded Services		1,683
White - Non-Hispanic	685	40.70%
White - Hispanic	4	0.24%
American Indian/Native Alaskan	3	0.18%
Asian	76	4.52%
Black or African American	902	53.59%
Native Hawaiian/Pacific Islander	0	0.00%
Persons Reporting Some Other Race	3	0.18%
Persons Reporting 2 or More Races	0	0.00%
Race Missing	10	0.59%
Hispanic or Latino	6	0.36%
Not Hispanic or Latino	255	15.15%
Ethnicity Missing	1,422	84.49%
Rural	0	0.00%
Not Rural	1,683	100.00%
Rural Unknown	0	0.00%
Caregivers that are not Clients - Poverty Ignored	0	0.00%
Individuals with Poverty Unanswered	223	13.25%
Individuals with Pov Unanswered and Cong V	11	0.65%
Individuals in Poverty / Minority	407	24.18%
Individuals in Poverty / Non-Minority	138	8.20%
Individuals in Poverty	545	32.38%
Individuals Not in Poverty	915	54.37%

Note: Poverty for these calculations are determined by the 'Yes' / 'No' question found in the 'Quick Form or Federal Poverty / Sliding Fee Form' category of the assessment screen.

VDA NAPIS Missing Poverty Yes/No for Title III Detail

Note: This report was designed to display the people that make up the "Individuals with Poverty Unanswered" field found on the VA01 report

Agency / Provider: **VDA Training Agency**

SSN	Name	Most Recent Assess	Most Recent Service	Cong Meal Vol	Status
0000003130	Jones, A. Karol	10/21/2002	10/31/2003		Closed
A000000450	Jones, Adaline	11/16/2004	12/31/2003		Active
0000002317	Jones, Alberta	10/04/2002	06/30/2003		Closed
A000000177	Jones, Alberta	04/14/2003	04/30/2003		Closed
A000000359	Jones, Angela	03/30/2004	12/31/2003	true	Active
0000002711	Jones, Ann	12/04/2002	12/31/2003		Deceased
0000003080	Jones, Anna	04/16/2004	11/30/2003		Active
0000002278	Jones, Annie	12/10/2004	11/30/2003		Active
0000001280	Jones, Aretta	08/29/2003	12/31/2003		Closed
0000001964	Jones, Audri	12/03/2003	12/31/2003		Closed
0000001296	Jones, Barbara	11/23/2004	12/31/2003		Active
0000001750	Jones, Barbara	10/30/2001	10/31/2003		Closed
A000000699	Jones, Barbara	01/10/2005	12/31/2003		Active
A000000335	Jones, Bessie	06/26/2002	06/30/2003		Deceased
0000001058	Jones, Beth	02/06/2003	08/31/2003		Closed
0000003234	Jones, Betty	09/11/2003	10/31/2003		Deceased
A000000582	Jones, Betty	10/01/2002	12/31/2003		Closed
0000003033	Jones, Bong-Hwa	12/02/2004	12/31/2003		Active
0000001950	Jones, Bonnie	03/24/2003	04/30/2003		Closed
A000000185	Jones, Brenda	12/25/2004	12/31/2003		Active
0000002236	Jones, Byong-Ok	09/15/2004	12/31/2003		Active
0000001589	Jones, Carol	03/30/2004	10/31/2003	true	Closed
A000000149	Jones, Carr	02/06/2003	07/31/2003		Closed
0000002513	Jones, Carroll	09/06/2002	10/31/2003		Closed
A000000594	Jones, Catherine	02/21/2003	03/31/2003		Deceased
0000002587	Jones, Chong-Suk	09/15/2004	12/31/2003		Active
0000001435	Jones, Chong-Woon	09/15/2004	12/31/2003		Active
0000001467	Jones, Choo Ja		04/30/2003		Closed
0000002903	Jones, Christine	06/27/2003	08/31/2003		Closed

VDA NAPIS Missing Poverty Yes/No for Title III Detail

Note: This report was designed to display the people that make up the "Individuals with Poverty Unanswered" field found on the VA01 report

Agency / Provider: **VDA Training Agency**

SSN	Name	Most Recent Assess	Most Recent Service	Cong Meal Vol	Status
0000002990	Jones, Yu-Tae	12/17/2004	12/31/2003		Active

Individuals Poverty Yes/No Unanswered (Includes No Assessment) During Time Perio	223
Individuals Poverty Yes/No Unanswered but are a Congregate Meal Volunteer	11
Individuals with Assessment During Time Period but not Yes/No	215
Individuals Without an Assessment During Time Period	8

Note: Poverty by the 'Yes' / 'No' question is found in the 'Quick Form or Federal Poverty / Sliding Fee Form' category of the assessment screen.

VDA - Clients Receiving Service without a Recent Assessment

VDA Training Agency

From: 01/01/2000
To: 01/09/2006

Note: This Report lists all active clients for services mapped to any NAPIS group other than "Local AAA" that have received at least one unit of service during the selected time period and have not been assessed or reassessed as of one year prior to the most recent service date found during the period.

Agency / Provider: VDA Training Agency

SSN	Last Assess Date	Name	Address1	City	Case Worker	Home Phone
000-00-01156	12/22/2003	Jones, Alma	11156 Test Drive	Trainsville	Employee Judy	(999) 555-4428
000-00-02247	01/29/2004	Jones, Harriet	12247 Test Drive	Trainsville	Employee Jackie	(999) 555-4557
000-00-02166	01/05/2004	Jones, James	12166 Test Drive	Trainsville	Employee Judy	(999) 555-4545
000-00-01213	01/30/2004	Jones, Mamie	11213 Test Drive	Trainsville	Employee Marion	(999) 555-4996
000-00-02871	01/29/2004	Jones, Queen	12871 Test Drive	Trainsville	Employee Jackie	(999) 555-4557
DA0-00-00037	12/22/2003	Jones, Reginald	137 Test Drive	Trainsville	Employee Grant	(999) 555-4428
A00-00-00656	12/22/2003	Jones, Ricardo	1656 Test Drive	Trainsville	Employee Grant	(999) 555-4428

Number of Clients   7

NAPIS_GROUP	SSN	Name	Age	Units
	VDA Training Agency			
01 - Personal Care	A000000710	Jones, Helen	58	103.00
01 - Personal Care	0000002569	Jones, Virgel	52	131.00
01 - Personal Care	0000002599	Jones, Frank	59	270.00
01 - Personal Care	0000002489	Jones, Rebecca	56	251.00
04 - Home Delivered Meals	0000001517	Jones, Lyman II	51	425.00
04 - Home Delivered Meals	0000001521	Jones, Pamela	45	2384.00
04 - Home Delivered Meals	0000001917	Jones, Frances	58	35.00
04 - Home Delivered Meals	A000000880	Jones, Janet	52	438.00
04 - Home Delivered Meals	0000001789	Jones, Alexander	59	50.00
04 - Home Delivered Meals	A000000230	Jones, Donzella	52	345.00
04 - Home Delivered Meals	0000001014	Jones, Scherry	49	85.00
04 - Home Delivered Meals	0000003025	Jones, Jeffrey	54	29.00
04 - Home Delivered Meals	0000001522	Jones, Willie	47	1475.00
04 - Home Delivered Meals	0000002649	Jones, Faye	59	99.00
04 - Home Delivered Meals	0000001015	Jones, Joyce	46	385.00
04 - Home Delivered Meals	0000001529	Jones, Connie	52	118.00
04 - Home Delivered Meals	0000002822	Jones, Kerri	44	58.00
04 - Home Delivered Meals	0000002599	Jones, Frank	59	404.00
04 - Home Delivered Meals	0000002946	Jones, James	59	485.00
04 - Home Delivered Meals	A000000720	Jones, Marie	58	39.00
04 - Home Delivered Meals	0000002976	Jones, Marvia	56	35.00
04 - Home Delivered Meals	A000000656	Jones, Ricardo	36	423.00
04 - Home Delivered Meals	0000001611	Jones, Shirley	58	214.00
07 - Congregate Meals	0000002850	Jones, John	49	82.00
07 - Congregate Meals	0000002920	Jones, Sabrina	30	118.00
07 - Congregate Meals	A000000346	Jones, Mary	58	89.00
07 - Congregate Meals	0000001391	Jones, James	58	8.00
07 - Congregate Meals	DA00000019	Jones, Margaret	59	11.00
07 - Congregate Meals	0000002547	Jones, Thelma	53	2.00
07 - Congregate Meals	0000002750	Jones, Roland	53	16.00
07 - Congregate Meals	0000001750	Jones, Barbara	58	107.00
07 - Congregate Meals	0000001025	Jones, Harvey	58	143.00
07 - Congregate Meals	0000001105	Jones, Brian	36	602.00
07 - Congregate Meals	0000001669	Jones, Clifford, Sr.	59	102.00
07 - Congregate Meals	0000001760	Jones, Ida	55	454.00
07 - Congregate Meals	A000000359	Jones, Angela	55	630.00
07 - Congregate Meals	0000002470	Jones, Regina	38	51.00

VDA Title III-E Program Group Listing

VDA Training Agency

Program Group	Clients Without Caregiver * Linked	Clients Without Caregiver ** Checked	Clients With Caregivers *** Linked	Caregivers **** Checked	Caregivers ***** Benefited	Individuals (Clients or Caregivers)	Total Units Individuals
VDA Training Agency							
III-E Adult Day Care - Respite	6	25	19	19	24	44	8,622.00
III-E Personal Care - Respite	23	78	55	61	64	139	12,630.00
Duplicated Count, Sum of Units for VDA Training Agency	29	103	74	80	88	183	21,252.00
Unduplicated Count, Sum of Units for All:	**29**	**103**	**74**	**80**	**88**	**183**	**21,252.00**

Note: All counts for people are only for those who have received service to a III-E Program Group (901 - 919) and III-E NAPIS Group (101 - 105).

* - "Clients Without Caregiver Linked" column numbers should be zero. VA35 can show the individuals.

** - "Clients Without Caregiver Checked" column are persons directly receiving service that are not caregivers.

*** - "Clients With Caregivers Linked" column can be associated with the "Actual Persons Served with a Caregiver" field from the Title III-E and Title III-E Grandparents worksheet in the AMR. VA37 can show the individuals.

**** - "Caregivers Checked" column can be associated with the "Actual Caregivers Served" field from the Title III-E and Title III-E Grandparents worksheet from the AMR. VA38 can show the individuals.

***** - "Caregivers Benefitted" column can be associated with field of the same name on the Title III-E and Title III-E Grandparents worksheet from the AMR. This number should not be less than "Caregivers Checked". VA34 can show the individuals.

VDA NAPIS Group - Individuals and Units

VDA Training Agency
Unduplicated Count - Total Units

NAPIS_GROUP	*	Individuals	Units
VDA Training Agency			
01 - Personal Care	82.50	291	33,501.25
04 - Home Delivered Meals	3,275.00	946	293,090.00
05 - Adult Day Care /Health		14	3,428.00
07 - Congregate Meals	5,868.00	612	108,956.00
10 - Transportation	134.00	661	64,125.00
11 - Legal Assistance		92	293.60
13 - Information and Assistance	1.00	1,332	9,873.00
B - Disease Prevention/Health Promotion	87.80	317	2,955.05
B - Medication Management		162	74.40
Caregiver Respite Care	6.00	181	21,060.00
CCEVP		140	1,405.25
F - Emergency	5.00	253	700.00
Local AAA	424.00	1,651	17,774.50
Protect Elder Rights		35	252.00
Duplicated Count, Sum of Units for VDA Training Agency		6,687	557,488.05
Unduplicated Count, Sum of Units for All:		**2,999**	**557,488.05**
Unduplicated Count, Sum of Units for All Except for "Local AAA":		**2,546**	**539,713.55**

* Percentage and Total Units Keyed 42 Days After Service Delivered:	1.77%		9,883.30

VDA NAPIS Group Detail and Units

Note: This report displays persons with at least one unit of any service during the time period.

Agency / Provider: VDA Training Agency

SSN	Last Name	First Name	Most Recent Assess	Most Recent Service	Cong Meal Vol
0000003130	Jones	A. Karol	10/21/2002	10/31/2003	
13 - Information and Assistance			2		
0000001867	Jones	Ada	06/12/2003	06/30/2003	
F - Emergency			1		
0000001944	Jones	Ada	08/29/2003	06/30/2003	
10 - Transportation			6		
0000003213	Jones	Ada	02/28/2003	03/31/2003	
11 - Legal Assistance			2		
A000000971	Jones	Ada	07/08/2004	10/31/2003	
07 - Congregate Meals			289		
10 - Transportation			286		
13 - Information and Assistance			1		
B - Disease Prevention/Health Promotion			8		
F - Emergency			1		
A000000450	Jones	Adaline	11/16/2004	12/31/2003	
07 - Congregate Meals			231		
10 - Transportation			189		
13 - Information and Assistance			2		
B - Disease Prevention/Health Promotion			13		
0000001289	Jones	Addie	09/20/2004	05/31/2003	
10 - Transportation			4		
0000002100	Jones	Addie	03/10/2004	12/31/2003	
01 - Personal Care			162		
04 - Home Delivered Meals			428		

From: 01/01/2003

VDA Training Agency

To: 12/31/2003

Note: This report displays persons with at least one unit of any service during the time period.

Agency / Provider: VDA Training Agency

SSN	Last Name	First Name	Most Recent Assess	Most Recent Service	Cong Meal Vol
0000001552	Jones	Zelma	09/15/2004	12/31/2003	

B - Disease Prevention/Health Promotion   0

Number of Service Lines Over The Average of 2 Units Per Day   8

01 - Personal Care		Respite Home Health
02 - Homemaker		Respite Compantion
03 - Chore		Respite Homemaker
04 - Home Delivered Meals	7	Respite Hospice
05 - Adult Day Care Health		Respite Personal Care
06 - Case Management		Respite Other
07 - Congregate Meals		Guardianship
08 - Nutrition Counseling		CCEVP
09 - Assisted Transportaion		Local AAA 1
10 - Transportation		F - Employment Title III
11 - Legal Assistance		B - Health Education/Screening
12 - Nutrition Education		B - Home Health
13 - Information and Assistance		F - Identification/Discount
14 - Outreach		B - Medication Management
A - Residential Repair and Renovation		D - Socialization/Recreation
B - Disease Prevention/Health Promotion		D - Volunteer Programs
Protect Elder Rights		F - Money Management
D - Checking		Caregiver Counseling
Access and Coordination		Caregiver Respite Care
F - Emergency		Caregiver Supplemental Programs
Respite Adult Day Care License		Caregiver Access Assitance
Respite Adult Day Care No License		Caregiver Information Programs